

Supervisor Annual Review

Manager Evaluation - View

Scott Grigg

Job Title: Financial Operations Supervisor
Document Type: Supervisor Annual Review
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Status: Approval - Approved - Approved

Manager: Kenneth Maun
Period: 05/23/2016 - 09/30/2016
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Section 1 - Mission Statement

Mission 1: 3101-Tax Assessor

Description :

It is the duty of the Tax Assessor and Collector to assess and collect for the County all taxes imposed on property within the county. The County Tax Assessor and Collector is designated by statute as the agent for the state Department of Highways and Public Transportation for collection of motor vehicle fees. Under the registration statutes, every owner of a motor vehicle is required to register it with the tax assessor in the county in which the owner resides. The County Tax Assessor and Collector is required to make bank deposits and reports according to the terms of several statutes. Under the laws regulating the county depository, the county tax collector is required to deposit all taxes collected by him for the state, county, or special districts for which he collects taxes.

Section 2 - Employee Goals

Goal 1: Customer Service

Description :

Reflect the philosophy of the elected official. Be available to customers,

employees, and co-workers, and other department heads. Present a positive atmosphere. Manages difficult customer situations, responds promptly to customer needs and questions, such as on productivity questions. Offers assistance and support to employees and co-workers at all times. Be courteous to all.

Measurement :

Supervisor and clerks will be observed to ensure levels of customer service. Feedback from taxpayers, other supervisors and other sources will be evaluated to ensure positive service continues to be provided. The level of information being provided the the other departments and reports to all entities that we serve.

Manager Rating: 2-Strong Performance

Weight: 30%

Manager Comments: Scott is working with supervisors on procedures and open items while he is assuming control of the financial responsibilities for the tax office. His previous experience auditing the tax office is proving of benefit.

Created By : Kenneth Maun

08/18/2016 2:20PM

Goal 2: Plan, Manage and Supervise

Description :

Plan, Manage and Supervise Supervise the work of seven (7) employees in the Accounting Department. Two (2) of the employees are back-up supervisors and five (5) are clerks. Monitor (audit) the production work of all employees in the Collin County Tax Office and provide feedback to the other department

supervision and management.

Measurement :

Reviewing the presence of the personnel, their work ethic, positive relationship with their group and with other departments, and monitoring the timeliness and accuracy of standard reports and additional requested information.

Manager Rating: 3-Exceeded

Weight: 15%

Scott is providing good knowledge and control to the financial employees of the tax office. He is working on the problems which have not been dealt with for the last couple of years. He is helping correct the outstanding reconciling items that have been too long on the records.

Manager Comments:

He is working with the other supervisors to document procedures in the tax office. He is a bonus to our office.

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08/18/2016 2:20PM

Goal 3: Training

Description :

Review accounting systems with personnel to demonstrate the most accurate and efficient methods of processing information and getting the desired reports. Develop and implement computer systems to control new collections required by new legislation but not supported by current systems.

Measurement :

Observing the knowledge level of the personnel, the data and other information being processed, the questions and performance of the clerks. Attendance at the regional and state meetings, and discussions of the laws, procedures and other factors affecting our office and our reporting and data retention.

Manager Rating: 2-Strong Performance

Weight: 15%

Manager Comments: The tax office personnel were in need to guidance and accounting knowledge, and Scott has brought that to the office. I expect that this will continue to be of benefit while he continues to review all of the accounts.

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Goal 4: Security

Description :

Review all basic documents and reports to determine that funds of the office have been deposited correctly and that all funds are being correctly accounted for and distributed according to the laws and agreements. Prepare the permanent financial reports for the Collin County Tax Office on a monthly basis.

Prepare special request financial reports on an as needed basis.

Measurement :

Monitor the timeliness and accuracy of the reconciliations of banks and other accounts, the timeliness of monthly reporting to the state, county and office of data, production information and monies. The ability to respond to the reports by the county auditor office. Monitor the timeliness of money transfers to all

entities. Being aware of the timeliness, reporting and detail of any irregularities, or reports of any unusual items.

Manager Rating: 3-Exceeded

Weight: 40%

Scott has already helped in documenting cash procedures. The cash procedures had not been updated recently, and with personnel turnover there was some laxity in the performance of these procedures.

Manager Comments:

He started with cash procedures because they have the highest potential for problems.He has reviewed the deposit procedures and helped on better consistency and documentation.

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Goals Summary

Manager Rating: 3-Exceeded
Summary Weight: 100%

Section 3 - Training

Attend Courses

Description :

Take course, working towards a PCC and CTOP designation.

Manager Comments: Scott has attended a Tax Assessor Collector state conference. He will be joining us at a Tax Assessor Collector regional conference in September. He is making contacts with other financial people from other offices and will be able to contact them in a beneficial manner for the tax office.

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Section 4 - Competencies

Competency 1: Job Knowledge

Description :

Demonstrates technical skills or knowledge required for key components of the job. Conducts job duties in accordance with county rules, regulations and ethical standards. Demonstrates sound judgement.

Manager Rating: 2-Strong Performance

Manager Comments: Scott has job knowledge due to his auditing background with this office. He is picking up more of the detailed information every day, and will be more beneficial with time.

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Competency 2: Communication

Description :

Courteous to internal and external customers. Responds appropriately to requests for assistance. Able to express ideas and information clearly and effectively through appropriate medium (verbal, written or electronic).

Manager Rating: 3-Exceeded

He has shown good relations with the supervisors and communicated both problems and accomplishments with management.

Manager Comments:

He has already shown progress for our office with the County Auditor and installed procedures for handling security funds and procedures. He has provided information on problem areas to both management and the auditors.

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Competency 3: Effectiveness

Description :

Demonstrates accuracy and attention to detail. Follows activities through to completion. Identifies areas for improvement and seeks appropriate solutions. Performs duties in a timely manner and meets deadlines. Completes an acceptable volume of work.

Manager Rating: 2-Strong Performance

Manager Comments: We have had progress in this area and look forward to greater results.

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Competency 4: Conduct/Work Habits

Description :

Cares for materials, equipment and the work area. Conveys a positive and professional image. Willingly accepts supervision. Keeps management informed of potential issues.

Manager Rating: 2-Strong Performance

Manager Comments: He conveys a good image for the office and displays knowledge which will help the office improve.

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Competency 5: Teamwork

Description :

Establishes and maintains effective relations both within the department and with other departments. Offers assistance and support to coworkers.

Manager Rating: 2-Strong Performance

Manager Comments: He is working well with units in the tax office, the county and the state.

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Competency 6: Planning and Organizing

Description :

Sets priorities effectively. Uses time and resources efficiently. Works in an organized manner. Anticipates and resolves problems.

Manager Rating: 2-Strong Performance

Manager Comments: He is working on the items that he is aware need to be corrected, and will continue reviewing on a ongoing basis.

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Competency 7: Leadership

Description :

Recommends appropriate courses of action. Ability to think strategically and align department goals with overall

county objectives. Ability to persuade others to take action. Leads by example. Promotes a cooperative work environment.

Manager Rating: 2-Strong Performance

Manager Comments: He is providing knowledge and guidance to the tax office personnel and we expect more results in the future.

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Competency 8: Personnel Management

Description :

Coaches and motivates staff. Recruits, selects and retains capable, productive employees. Assesses and provides for employee development and succession planning. Takes corrective action on employee issues in a timely manner.

Manager Rating: 2-Strong Performance

Manager Comments: He has given better direction to the financial department staff and seeks greater cooperation and efficiencies.

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Competencies Summary

Manager Rating: 2-Strong Performance

Section 5 - Manager Comments

Manager Comments:

Section 6 - eSignature Section

Attachments

No Attachments have been added to this document

Audit History

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